E-Grants Management System
MONTANA Office of Public Instruction

E-GRANTS COMPREHENSIVE USER GUIDE

Montana
Office of Public Instruction
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The Office of Public Instruction has the following grants currently available through the E-Grants System:

- ESEA/NCLB Consolidated
  - Title IA – Improving the Academic Achievement of the Disadvantaged (Basic)
  - Title I A – Schoolwide
  - Title II A – Improving Teacher Quality
  - Title II D – Enhancing Education through Technology (Ed Tech)
    (Funding discontinued, carryover projects only)
  - Title III – English Language Acquisition
  - Title VIB, Subpart 2 – Rural Low-Income Schools (RLIS)
- IDEA Consolidated
  - Individuals with Disabilities Education Act Part B (IDEA Part B)
  - Individuals with Disabilities Education Act Preschool (IDEA Preschool)
- Carl D. Perkins Career and Technical Education
- Title I School Improvement
- Title IV Part B 21st Century – Continuing projects only.
- Title I Part C Migrant Education
- Gifted and Talented State Grant
- McKinney-Vento Homeless

COMPLETING E-GRANTS SYSTEM APPLICATIONS

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

PLANNING TOOL

Program Specific Notes on the Planning Tool

ESEA/NCLB Consolidated – When districts apply as a system (combined elementary and high school districts applying with the same application) or as a member of a consortium, only the district designated as the prime applicant needs to complete the Planning Tool.

IDEA Consolidated – Every member of a cooperative, consortium, or system (combined elementary and high school districts applying with the same application) needs to complete Topic 5 in the Planning Tool, e.g., if the elementary district is the designated administrative agent for a system, both entities must complete the Planning Tool separately.

Carl Perkins – The high school district must complete Topic 7 in the Planning Tool even if the elementary school completed the Planning Tool for the ESEA/NCLB or IDEA applications.

Title I School Improvement – The LEA receiving funds must complete Topic 1 in the Planning Tool.

Gifted and Talented – The LEA receiving funds must complete Topic 5 in the Planning Tool.

Migrant – The LEA receiving funds must complete the Planning Tool.

21st Century and **McKinney-Vento Homeless** – The Planning Tool is not required.

The Planning Tool must be completed before the **Topic Funding** and **Budget Pages** of all applications, except 21st Century and McKinney-Vento Homeless, can be completed.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **Planning Tool** from the **Menu List**.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have the Planning Tool displayed on the menu list.
3. If more than one LEA is listed, *select* the appropriate LEA.

4. *Click* on the radio button to select the prior year Planning Tool.
5. *Click* the **COPY TO NEW YEAR** button to copy last year's goals into the new application.

   - OR -

6. Complete the Planning Tool for the new application year by clicking **ADD NEW YEAR**.
7. Return to the **Menu List** Page.

Note: Information from the completed Planning Tool is pulled into various pages within the applications.

ESEA/NCLB CONSOLIDATED APPLICATION

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

Note: ESEA/NCLB application pages need to be completed at the consolidated level of the application and the individual title program levels. The application opens at the ESEA/NCLB Consolidated level. Individual title program levels are selected from the drop-down list in the upper-right corner of the application.

Districts refusing all ESEA/NCLB funds must create an ESEA/NCLB Consolidated application, complete the **Allocations**, **Private/Nonpublic Participation/ Schools 1-15**, **Common Assurances** and **Final Assurances Agreement** pages and submit the application to the OPI. Click here for specific instructions.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

   Click here to go to the section on completing the Planning Tool.

3. *Click* **ESEA/NCLB Consolidated** from the **Menu List**.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.

4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
   - *Click* the **CREATE APPLICATION** button.

   - OR -

6. *Continue* an application already created.
   - *Click* on the radio button next to the current application.
   - *Click* the **OPEN APPLICATION** button.
7. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
8. *Click* the **Funding** tab (opens **Allocations Page**).
   - Review allocations for each title program.
   - Eligible districts may *transfer* or *flex* funds in the middle section of the page.

     Note: Schoolwide-eligible districts must mark their qualifying schools as SWP on the **Title I Targeting Step 4** page before transferring/flexing to the schoolwide program on the allocations page.

   - To decline (i.e. not apply for) some of the allocated funds, scroll down to the "Funds not applied for" section and *click* the box under the title program(s) that are being declined.
     - Decline current year funds, prior year funds, or both.
     - **Caution:** Once a check box is checked and the page is saved, the check box cannot be unchecked.
   - *Save the page.*
   - Click here for more detailed information about the Funding/Allocations page.
9. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
   - *Review* topics for applicable title programs.

- Districts eligible for Title VIB, Subpart 2 (RLIS) should *select* topics for Title VIB.
- *Save the page.*

You will not be able to get to the budget pages until the Topic Funding page is reviewed.

Go to each applicable program level, i.e. Title IA, IIA, IID, etc., using the "Application Sections" drop-down list in the upper-right corner of the page.

1. *Complete* the **Program Detail** pages (and all sub-tabs) for each title program that has an allocation.
   - *Save each page before moving to the next.*
2. *Click* the **Budget Pages** tab.
3. (Title I A - Basic only) *Complete* **Full-Time Equivalents** page.
4. (Titles IIA, IID, and III) *Complete* **Private/Nonpublic Equitable Share** pages.
   - *Complete* for every program with an "Allocation Available for Budgeting."
   - *Enter* enrollment for Participating Private/Nonpublic Schools.
     - Enter "0" if there are no Participating Private/Nonpublic Schools in the district.
   - The "Equitable Share" for participating private/nonpublic schools displays on the last line.
   - *Save the page.*
5. *Complete* the **Budget Detail** page for each title program with an allocation.
   - Budget the "Total Allocation Available for Budgeting" displayed at the top of the **Budget Detail** page.
   - *Enter* the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
   - If eligible, *enter* the "Maximum Indirect Cost" or a lesser amount on Line G.
     - The "Maximum Indirect Cost" is automatically calculated (Line E) on the Budget Detail page for districts with an approved Indirect Cost rate.
     - Districts are not required to enter an indirect cost amount.
   - *Click* the **CALCULATE TOTALS** button to keep a running total of budgeted allocations.
   - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

6. *Complete the* **Property and Equipment** page, if applicable.
   - *Save the page.*

Once all program pages and budget pages have been completed for each title program with an allocation, *return* to the **ESEA/NCLB Consolidated** level of the application from the drop-down list in the upper-right corner.

1. *Complete* the **Private/Nonpublic School Participation** page(s).
   - Enter "0" if there are no Participating Private/Nonpublic Schools in the district.
   - *Save the page.*
2. *Click* the **Assurances, Common and Program** tab.
   - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, Program Specific Assurances (every title program with an allocation available for budgeting), and the Final Assurances Agreement.

The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

   - (AR only) *Click* the check box on each applicable **Assurance** page.
   - *Save the pages.*
   - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Assurances Agreement** page. The date will auto-fill.
3. *Click* the **Submit** tab.
   - *Run* the consistency check.
   - Correct any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

4. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.

Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **Lock Application** button to lock the application thereby preventing changes to completed application pages. Use the **Unlock Application** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **Unlock Application** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

FUNDING/ALLOCATIONS PAGE - ESEA/NCLB

The Allocation page provides view-only access to project and multi-district allocation information as well as enterable fields for transferring funds across multiple programs. It is an excellent source of information for consolidated planning.

The **Allocations** page is divided into seven sections:

1. **Current Year Funds**
   - Allocations
   - Reallocated funds
   - Released funds
   - Total

2. **Prior Year Allocation** (Prime Applicant carryover and reallocated funds)
    - Allocations
    - Reallocated funds
    - Total
3. **Multi-district**
    - Transfers In
        - Displays on the allocation page when district is a prime applicant/administrative agent for a system or consortium.
        - Includes current amounts from member districts.
    - Transfers Out
        - Displays on the allocation page when district is a member of a system or consortium.
        - Includes current amount going to the prime applicant/administrative agent.
    - Administrative Agent
        - The administrative agent's three-digit county number + LE number is displayed as a blue hyperlink.
        - *Click* on this hyperlink to view the prime applicant and all participating system/consortium members and their contributing allocations.
            - The participating members can vary between title programs, e.g. one system member for Title I, five consortium members for Title III.
4. **Funds Available for Transfer/Flex** (per ESEA Title VI)
    - *Complete* this section to show the funds your district is transferring or flexing based on eligibility (indicated in the "Applicable Percentage" line).
    - The row "Total Available for Transfer/Flex" displays the amount of funds available to be transferred/flexed out.
        - The system will not allow districts to transfer/flex funds unless they are designated as eligible districts.
5. **Transfers to Schoolwide**
    - If your district has an approved schoolwide plan, *enter* the amount of money from each title program you are moving to schoolwide.

- Follow the instructions under the "Transfers to Schoolwide" heading on the **Allocations** page.

Note: Schoolwide-eligible districts must mark their qualifying schools as SWP on the **Title I Targeting Step 4** page before transferring/flexing to the schoolwide program on the allocations page.

6. **Funds not applied for**
    - To refuse <u>some but not all</u> ESEA/NCLB program funds, *click* the box for either current year, prior year or both under the title programs for which the district is not applying.
    - **Caution:** Once a check box in the "Funds not applied for" section is checked and the page is saved, the check box cannot be unchecked.
    - *Save the page.*
7. **Total Available for Budgeting**
    - The "Total Available for Budgeting" line will reflect all adjustments to project funds and will display the total funds available for each program budget and budget detail page.

Remember the "Click for Instructions" hyperlink for assistance completing pages!!

REFUSING <u>ALL</u> ESEA/NCLB FUNDS

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
    - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **ESEA/NCLB Consolidated** from the **Menu List**.
    - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Create* a new application.
    - *Click* the **CREATE APPLICATION** button.
5. *Click* the **Funding** tab (opens **Allocations Page**).
    - *Scroll down* to the "Funds not applied for" section.

- *Click* the box under each title program where allocations are being declined.
    - Decline current year funds, prior year funds, or both.
    - **Caution:** Once a check box is checked and the page is saved, the check box cannot be unchecked.
- *Save the page.*

6. *Click* the **Private/Nonpublic School Participation** tab.
    - *Complete* the **Schools 1-15** page.
        - Enter "0" if there are no Participating Private/Nonpublic Schools in the district.
    - *Save the page.*
7. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances and the Final Assurances Agreement.
    - (AR only) *Click* the check box on the **Common Assurances** page.
    - (AR only) *Click* the **LEA AGREES** button.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Assurances Agreement** page. The date will auto-fill.
8. *Click* the **Submit** tab.
    - *Run* the consistency check.
    - Correct any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

9. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

IDEA CONSOLIDATED APPLICATION

Note: Unlike the ESEA/NCLB Consolidated application where a system's administrative agent submits a single application for the system, all LEA's must complete and submit an IDEA Consolidated application. System, consortium, and cooperative members complete a simplified application, which is submitted to the system/consortium/cooperative administrative agent (AA) for approval. The AA approves the member application(s) and completes a more comprehensive application for submittal to the OPI.

The applicant will be logged in as one of the following:

- An independent applicant.

- A special education cooperative administrative agent, or
- A special education cooperative member.

- A consortium administrative agent, or
- A consortium member.

- A school system administrative agent, or
- A system member.

INDEPENDENT APPLICANTS (NOT PART OF A SYSTEM, CONSORTIUM OR COOPERATIVE)

Click here to skip to the System, Consortium and Cooperative Member Application section.
Click here to skip to the System, Consortium and Cooperative Administrative Agent Application section.

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.

2. If the Planning Tool has not been completed, *complete* the Planning Tool.

   Click here to go to the section on completing the Planning Tool.

3. *Click* **IDEA Consolidated** from the **Menu List**.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
   - *Click* the **Create Application** button.

   - OR -

6. *Continue* an application already created.
   - *Click* on the radio button next to the current application.
   - *Click* the **Open Application** button.
7. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses <u>must</u> be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
8. *Click* the **Funding** tab (opens **Allocations Page**).
   - Review allocations for each program.
9. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
   - *Review* topics for IDEA.
   - *Save the page.*

   You will not be able to get to the budget pages until the Topic Funding page is reviewed.

10. *Click* the **Program Detail** tab.
    - *Complete* **Private/Nonpublic Schools** and **Maintenance of Effort (MOE)** pages.
    - *Save the pages.*

11. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.

The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on each **Assurance** page.
    - *Save the page.*
    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.

Go to the **IDEA Part B** level.

- Use the "Application Sections" drop-down list in the upper-right corner of the page.

1. *Click* the **Program Detail** tab.
    - *Review and complete* all **Objective** pages. The information is prefilled on the **Objective** pages. Follow instructions for selecting activities, when necessary.
    - *Save the pages if changes are made.*
    - *Complete* the **Early Intervening Services** page.
    - *Save the page.*
2. *Click* the **Budget Pages** tab (opens **Budget Detail** page).
3. *Complete* the **Budget Detail** page.
    - Budget the "Total Allocation Available for Budgeting" displayed at the top of the **Budget Detail** page.
    - *Enter* the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
    - If eligible, *enter* the "Maximum Indirect Cost" or a lesser amount on Line G.
        - The "Maximum Indirect Cost" is automatically calculated (Line E) on the Budget Detail page for districts with an approved Indirect Cost rate.
        - Districts are not required to enter an indirect cost amount.

- *Click* the **Calculate Totals** button to keep a running total of budgeted allocations.
- *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

4. *Complete* the **Property and Equipment** page, if applicable.
    - *Save the page.*

Select **IDEA Preschool**. (Use the drop-down list in the upper-right corner.)

1. *Complete* the **Budget Detail** page.
    - Budget the "Total Allocation Available for Budgeting" displayed at the top of the **Budget Detail** page.
    - Enter the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
    - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

2. *Complete* the **Property and Equipment** page, if applicable.
    - *Save the page.*

Return to the **IDEA Consolidated** level (drop-down list upper-right corner).

1. *Click* the **Submit** tab.
    - *Run* the consistency check.
    - *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

2. (AR only) *Click* the **Submit to the OPI** button to *submit* the application.

Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

SYSTEM, CONSORTIUM AND COOPERATIVE MEMBER APPLICATIONS

Click here to go to the Independent Applicant section.
Click here to go to the System, Consortium and Cooperative Administrative Agent Application section.

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

   Click here to go to the section on completing the Planning Tool.

3. *Click* **IDEA Consolidated** from the **Menu List**.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
   - *Click* the **CREATE APPLICATION** button.

   \- OR -
6. *Continue* an application already created.
   - *Click* on the radio button next to the current application.
   - *Click* the **OPEN APPLICATION** button.
7. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
8. *Click* the **Funding** tab (opens **Allocations Page**).
   - Review allocations for each program.
   - The member allocation will be in RED on the "Transfer Out" row. This means that it will be transferred into the Administrative Agent's (prime applicant) application for budgeting.
9. *Click* the **Program Detail** tab.
   - *Complete* **Private/Nonpublic Schools** and **Maintenance of Effort (MOE)** pages.
   - *Save the pages.*
10. *Click* the **Assurances, Common and Program** Tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.

The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

- (AR only) *Click* the check box on each **Assurance** page.
- *Save the page.*
- (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.

Go to the **IDEA Part B** level.

- Use the "Application Sections" drop-down list in the upper-right corner of the page.

1. *Click* the **Program Detail** tab.
    - *Review and complete* all **Objective** pages. The information is prefilled on the **Objective** pages. Follow instructions for selecting activities, when necessary.
    - *Save the pages if changes are made.*

Return to the **IDEA Consolidated** level (drop-down list upper-right corner).

1. *Click* the **Submit** tab.
    - *Run* the consistency check.
    - *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "The application has not yet been submitted. Click below to submit the application to the Administrative Agent," will appear.

2. (AR only) C*lick* the **SUBMIT TO ADMIN AGENT** button to *submit* the application to the Administrative Agent.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the Administrative Agent at this point. The district Authorized Representative must make final submission to the Administrative Agent.

Once the application has been submitted, the **Application Select** page status will be "Submitted to AA."

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.

- Only the user who locked the application and/or the district AR can unlock a locked application.

- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

SYSTEM, CONSORTIUM AND COOPERATIVE ADMINISTRATIVE AGENT APPLICATIONS

Click here to go to the Independent Applicant section.
Click here to go to the System, Consortium and Cooperative Member Application section.

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

Step 1: Approving Member Applications

Note: The process of approving member applications involves two browser windows open concurrently. Use caution going between the browser windows to avoid unintentionally closing the browsers.

1. *Log into* the E-Grants System using your pre-assigned user ID and password. (Browser 1)
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **IDEA Consolidated** from the **Menu List**.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
3. *Select* the Administrative Agent LEA on Organization Select page.
4. *Create* a new application.
   - Click the **CREATE APPLICATION** button.

   - OR -
5. *Continue* an application already created.

- *Click* on the radio button next to the current application.
- *Click* the **Open Application** button.

6. *Click* the **Funding** tab (opens **Allocations Page**).
   - Review allocations for each program.
7. *Click* the blue link in the middle of the page on the "Administrative Agent" row.
   - A new browser page will open (Browser 2).
     - Browser 2 lists all member districts, district type (system, cooperative), current application status (submitted, not submitted) and respective allocation information.
     - The "LE#" in the left-hand column is a hyperlink to the member's IDEA application.
8. When the member application is in "Submitted to AA" status, *click* the member LE# hyperlink.
   - The member's IDEA application will open in Browser 1.
9. *Review* the member's application for accuracy.
10. *Click* the **Submit** tab.
11. *Click* either the **Approve** or **Reject** button.
    - If rejected, the application will go back to the member for updates.
    - *Return* to Browser 2.
    - *Click* on the "Return to Admin Agent's Application Select" hyperlink (upper-right-hand corner).
      - This re-establishes your application in Browser 1.
    - Go back to Browser 2.
    - Click on the "Close Browser" hyperlink (upper-right-hand corner).

Note: all member applications must be approved before the Administrative Agent can submit their application.

Step 2: Completing Administrative Agent Applications

1. If the Planning Tool has not been completed, *complete* the Planning Tool.

   [Click here](#) to go to the section on completing the Planning Tool.

2. *Create* or *Open* the current year application.
3. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses <u>must</u> be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
4. *Click* the **Funding** tab.
5. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
   - Review topics for IDEA.
   - *Save the page.*

> You will not be able to get to the budget pages until the Topic Funding page is reviewed.

6. *Click* the **Program Detail** tab.
7. *Click* the **Private/Nonpublic Schools** page.
   - Enter Administrative Agent's Private/Nonpublic schools information. Member data is displayed (pulled in from member application(s)).
   - *Save the page.*
8. *Click* the **Maintenance of Effort (MOE)** tab.
   - State and local funds expenditures from two years prior <u>for all members</u> are prefilled.
   - *Enter* the amount of the Special Education Cooperative or Administrative Agent's state and local funds to be budgeted for the application year.
   - *Save the page.*
9. *Click* the **Assurances, Common and Program** tab.
10. The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.

> The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal

applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

11. (AR only) *Click* the check box on each **Assurance** page.
    - *Save the page.*
12. (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.

Go to the **IDEA Part B** level.

- Use the drop-down list in the upper-right corner.

1. *Click* the **Program Detail** tab.
   - *Complete* the **Early Intervening Services** page.
   - *Save the page.*
2. *Click* the **Budget Pages** tab (opens **Budget Detail** page).
3. *Complete* the **Budget Detail** page.
   - Budget the "Total Allocation Available for Budgeting" displayed at the top of the **Budget Detail** page.
   - *Enter* the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
   - If eligible, *enter* the "Maximum Indirect Cost" or a lesser amount on Line G.
     - The "Maximum Indirect Cost" is automatically calculated (Line E) on the Budget Detail page for districts with an approved Indirect Cost rate.
     - Administrative Agents are not required to enter an indirect cost amount.
   - *Click* the **CALCULATE TOTALS** button to keep a running total of budgeted allocations.
   - *Save the page.*

   Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.
4. *Complete* the **Property and Equipment** page, if applicable.
   - *Save the page.*

Select **IDEA Preschool**. (Use the drop-down list in the upper-right corner.)

1. *Complete* the **Budget Detail** page.

- Budget the "Total Allocation Available for Budgeting" displayed at the top of the **Budget Detail** page.
- Enter the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
- *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

2. *Complete* the **Property and Equipment** page, if applicable.
   - *Save the page.*

Return to the **IDEA Consolidated** level (drop-down list upper-right corner).

1. *Click* the **Submit** tab.
   - *Run* the consistency check.
   - *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Administrative Agent (AA) stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

- (AA only) C*lick* the **SUBMIT TO THE OPI** button to *submit* the application.

Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Admin Agent." The application is not submitted to the OPI at this point. The AA must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AA and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.

    - Only the user who locked the application and/or the district AR can unlock a locked application.

- A <u>successful</u> Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
    - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

CARL PERKINS – SECONDARY APPLICATION

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

Note to Systems: if the Planning Tool was completed for another E-Grants application (i.e., ESEA/NCLB) under the elementary district, a new Planning Tool will need to be created and completed for the high school district.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
    - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

    Click here to go to the section on completing the Planning Tool.
3. *Click* **Carl Perkins - Secondary** from the **Menu List**.
    - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
    - *Click* the **CREATE APPLICATION** button.

    - OR -
6. *Continue* an application already created.
    - *Click* on the radio button next to the current application.
    - *Click* the **OPEN APPLICATION** button.

7. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
8. *Click* the **End-of-Year Reports** tab (opens **Schools with Programs** page)
   - *Complete* the new row of tabs from left to right.
   - *Save all pages before moving to the next.*
9. *Click* the **Funding** tab (opens **Allocations Page**).
   - Review allocations.
10. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
    - Review topics.
    - *Save the page.*

You will not be able to get to the budget pages until the Topic Funding page is reviewed.

11. *Click* the **Application Pages** tab (opens **Required Uses of Funds**).
    - *Complete* the tabs (pages) from left to right.
      - *Complete* additional tab rows from left to right.
    - *Save all pages before moving to the next.*
12. *Click* the **Budget Pages** tab (first-row tabs - opens the **Fund Distribution** page).
13. *Complete* the **Funding Distribution** page.
    - *Save the page.*
    - *Click* the **Funding Comparison** tab (read-only page).
      - The total funds listed in the Funding Distribution table should equal the total funds budgeted on the budget detail page. The application will not pass the consistency check if the totals do not match.

14. *Click* the **Budget Detail** tab.
    - Enter the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
    - Carl Perkins regulations cap administrative costs at 5%. Administrative costs include items entered under purpose code 23 - Administration plus indirect costs.
    - *Save the page.*

Note: Click "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

15. *Complete* the **Property and Equipment** page, if applicable.
    - *Save the page.*
16. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, Perkins Assurances, and the Final Agreement.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on **Perkins Assurances** page.
    - *Save the page.*
    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.
17. *Click* the **Submit** tab.
    - *Run* the consistency check.
    - *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

18. (AR only) *Click* the **SUBMIT TO THE OPI** button to *submit* the application.

Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

TITLE 1 SCHOOL IMPROVEMENT APPLICATION

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

Topic 1 must be completed in the Planning Tool before doing any budget work in **the Title I School Improvement** application.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.

2. If the Planning Tool has not been completed, *complete* the Planning Tool.

Click here to go to the section on completing the Planning Tool.

3. *Click* **Title I School Improvement** from the **Menu List**.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
   - *Click* the **CREATE APPLICATION** button.

   - OR -

6. *Continue* an application already created.
   - *Click* on the radio button next to the current application.
   - *Click* the **OPEN APPLICATION** button.
7. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
8. *Click* the **Funding** tab (opens **Allocations Page**).
   - Review allocations.
9. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
   - Review/select topics.
   - *Save the page.*

You will not be able to get to the budget pages until the Topic Funding page is reviewed.

10. *Click* the **Program Detail** tab.
    - *Complete* **Topic I Objectives and Activities**, **Public School Choice**, and **Supplemental Education Services** tabs (pages).
    - *Save each page before moving to the next.*

11. *Click* the **Budget Pages** tab.
12. Enter the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
    - *Save the page.*

Note: Click "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

13. *Complete* the **Property and Equipment** page, if applicable.
    - *Save the page.*
14. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on each applicable **Assurance** page.
    - *Save the pages.*
    - *Click* the **LEGAL ENTITY AGREES** button on the **Assurances** page. The date will auto-fill.
15. *Click* the **Submit** tab.
    - *Run* the consistency check.
    - *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

16. (AR only) C*lick* the **SUBMIT TO THE OPI** button to *submit* the application.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **Lock Application** button to lock the application thereby preventing changes to completed application pages. Use the **Unlock Application** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **Unlock Application** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

21ST CENTURY COMPETITIVE APPLICATIONS

Click here to go to the 21st Century - Continuing (Existing Project not in Sixth-Year) section.

21ST CENTURY APPLICATION (NEW PROJECT OR APPLYING FOR SIXTH-YEAR FUNDING)

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **21st Century** from the **Menu List**.
   - Contact the E-Grants Security Officer, at (406) 444-3448 if you do not have this application displayed on the menu list.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Create* a new application.

- *Click* the check box next to "This Program Allows you to have multiple projects. Would you like to create a new project for the current year?"
- *Enter* a title for the new project.
    - Titles help distinguish between projects when there is more than one 21st Century project in your district.
    - Be distinct with the title, for example: Hawthorne Elementary-Big Brothers Big Sisters Project.
- *Click* the **CREATE NEW PROJECT** button.

- OR -

5. *Continue* an application already created.
    - *Click* on the radio button next to the current application.
    - *Click* the **OPEN APPLICATION** button.
6. *Click* the **Application Type** tab.
    - Click the appropriate radio button.
    - *Save the page.*
        - If "Yes" is selected an additional group of items will appear when the page is saved.
        - Select the appropriate response from the two selections.
            - *Save the page again.*
7. *Click* the **Contact Information** tab.
    - Fill in all required fields and extra e-mail addresses.
        - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses <u>must</u> be entered at the bottom of the **Contact Information** page.
    - *Save the page.*
8. *Click* the **Allocations** tab.
    - This is a competitive grant. There will not be an allocation until the application has been approved.
    - Once the district's application has been accepted for funding, there will be funds listed on this page.

9. *Click* the **Program Detail** tab.
   - Complete each tab (page) from left to right.
   - *Save all pages before moving to the next tab.*
     - Pages will not save unless there is data in all text fields.
10. *Click* the **Budget Pages** tab.
    - *Enter* the description and itemization information for each budgeted expenditure.
    - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

11. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, Title IV Part B Assurances, and Final Assurances.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on each applicable **Assurance** page.
    - *Save the page. (Button text may say, "Legal Entity Agrees.")*
    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Assurances** page. The date will auto-fill.
12. *Click* the **Submit** Tab.
13. *Run* the consistency check.
14. *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

15. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

If your district's application is approved for funding, you may have to create an amendment to adjust the budget to the awarded amount. Click here for information on how to create an amendment to an approved application.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
    - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
    - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

21ST CENTURY – CONTINUING (EXISTING PROJECT NOT IN SIXTH-YEAR)

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
    - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **21st Century – Continuing** from the **Menu List**.

- Contact the E-Grants Security Officer, at (406) 444-3448 if you do not have this application displayed on the menu list.

3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Create* a new application.
   - *Click* the check box next to "This Program Allows you to have multiple projects. Would you like to create a new project for the current year?"
   - *Enter* a title for the new project.
     - Titles help distinguish between projects when there is more than one 21st Century project in your district.
     - Be distinct with the title, for example: Hawthorne Elementary-Big Brothers Big Sisters Project.
   - *Click* the **CREATE NEW PROJECT** button.

   \- OR -

5. *Continue* an application already created.
   - *Click* on the radio button next to the current application.
   - *Click* the **OPEN APPLICATION** button.
6. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
   - *Save the page.*
7. *Click* the **Allocations** tab.
   - Review allocations.
8. *Click* the **Program Detail** tab.
   - Complete each tab (page) from left to right.
   - *Save all pages before moving to the next tab.*
     - Pages will not save unless there is data in all text fields.

9. *Click* the **Budget Detail** tab.
   - *Enter* the description and itemization information for each budgeted expenditure.
   - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

10. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, Title IV Part B Assurances, and the Final Assurances.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on each applicable **Assurance** page.
    - *Save the page. (Button text may say, "Legal Entity Agrees.")*
    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Assurances** page. The date will auto-fill.
11. *Click* the **Submit** Tab.
12. *Run* the consistency check.
13. *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

14. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

TITLE I-C MIGRANT EDUCATION

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

   Click here to go to the section on completing the Planning Tool.
3. *Click* **Title 1-C Migrant Consolidated** from the **Menu List**.
   - Contact the E-Grants Security Officer, at (406) 444-3448 if you do not have this application displayed on the menu list.
   - In the first years of the grant being in E-Grants there were two separate Migrant applications depending on the time period the project was covering. The "Regular Term" and "Summer Term" applications remain on the menu list to allow access to past applications. These should not be used for new applications.
4. If more than one LEA is listed, *select* the appropriate LEA.

5. *Create* a new application.
    - *Click* the **CREATE APPLICATION** button.

    - OR -

6. *Continue* an application already created.
    - *Click* on the radio button next to the current application.
    - *Click* the **OPEN APPLICATION** button.
7. *Click* the **Contact Information** tab.
    - Fill in all required fields and extra e-mail addresses.
        - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
    - *Save the page.*
8. *Click* the **Funding** tab (opens **Allocations Page**).
    - Review allocations.
9. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
    - Review topics.
    - *Save the page.*

You will not be able to get to the budget pages until the Topic Funding page is reviewed.

10. *Click* the **Program Detail** tab.
    - Complete each tab (page) from left to right.
    - The **Instructional Initiatives** and **Mandatory Initiatives** tabs open an additional sub-tab row. Complete each tab (page) in the new tab strip then continue with the second-row tabs.
    - *Save all pages before moving to the next tab.*
11. *Click* the **Budget Pages** tab (opens **Budget Detail** page).
12. Enter the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
    - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

13. *Complete* the **Property and Equipment** page, if applicable.
    - *Save the page.*
14. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, Program Assurances, and the Assurances.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on **Program Assurances** page.
    - *Save the page.*
    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Assurances** page. The date will auto-fill.
15. *Click* the **Submit** Tab.
16. *Run* the consistency check.
17. *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

18. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.
    - Only the AR will have the **SUBMIT TO OPI** button.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **Lock Application** button to lock the application thereby preventing changes to completed application pages. Use the **Unlock Application** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **Unlock Application** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

GIFTED AND TALENTED STATE GRANT

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

Note to Systems: if the Planning Tool was completed for another E-Grants application (i.e., ESEA/NCLB) under the other system member, a new Planning Tool will need to be created and completed for the district applying for the GT funding.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

   Click here to go to the section on completing the Planning Tool.
3. *Click* **Gifted & Talented State Grant** from the **Menu List**.
   - Contact the E-Grants Security Officer, at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.

5. *Create* a new application.
    - *Click* the **Create Application** button.

    - OR -

6. *Continue* an application already created.
    - *Click* on the radio button next to the current application.
    - *Click* the **Open Application** button.
7. *Click* the **Contact Information** tab.
    - Fill in all required fields and extra e-mail addresses.
        - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
    - *Save the page.*
8. *Click* the **Funding** tab (opens **Allocations Page**).
    - Review allocations.
9. *Click* the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
    - Review topics.
    - *Save the page.*

    You will not be able to get to the budget pages until the Topic Funding page is reviewed.

10. *Click* the **Application Pages** tab (opens **Enrollment and Participation** page).
    - Complete all tabs (pages) on the sub-tab strip.
    - *Save each page before moving to the next tab.*
11. *Click* the **Budget Pages** tab (opens **Budget Detail** page).
12. Enter the appropriate amount under each Purpose Category and Object Code until "Allocation Remaining" (at the bottom of the **Budget Detail** page) equals $0.
    - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

13. *Complete* the **Property and Equipment** page, if applicable.
    - *Save the page.*
14. *Click* the **Assurances** tab.
    - *Enter* the URL for your district's gifted and talented education plan.
        - Contact the OPI Gifted and Talented Specialist for instructions if your district's gifted and talented education plan is not posted on the Web.
    - (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Assurances** page. The date will auto-fill.
15. *Click* the **Submit** tab.
16. *Run* the consistency check.
17. *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

18. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.

> **Note:** If district staff with the LEA data entry role are running the consistency check, the button text is "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the Contact Information page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
    - Only the user who locked the application and/or the district AR can unlock a locked application.

- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

MCKINNEY-VENTO HOMELESS

Note: The Planning Tool is not required for McKinney-Vento Homeless applications.

For page-specific instructions, click the "Click for Instructions" hyperlink. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **McKinney-Vento Homeless** from the **Menu List**.
   - Contact the E-Grants Security Officer, at (406) 444-3448 if you do not have this application displayed on the menu list.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Create* a new application.
   - *Click* the **CREATE APPLICATION** button.

   \- OR -
5. *Continue* an application already created.
   - *Click* on the radio button next to the current application.
   - *Click* the **OPEN APPLICATION** button.
6. *Read through* the **McKinney-Vento Information** pages (read-only pages).
7. *Click* the **Contact Information** tab.
   - Fill in all required fields and extra e-mail addresses.
     - If district clerks and LEA program/collaborating organization staff wish to receive automatic e-mail notifications of approved/returned applications, cash

requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.

- *Save the page.*

8. *Click* the **Allocation** tab.
   - This is a competitive grant. There will not be an allocation until the application has been approved.
   - Once the district's application has been accepted for funding, there will be funds listed on this page.
9. *Click* the **Program Detail** tab.
   - Complete each tab (page) from left to right.
   - *Save all pages before moving to the next tab.*
10. *Click* the **Budget Pages** tab (opens **Budget Detail** page).
    - *Enter* the description and itemization information for each budgeted expenditure.
    - *Save the page.*

Note: *Click* "Description of Purpose Categories and Object Codes" for details about Object Codes and Purpose Categories.

11. *Click* the **Budget Narrative** tab.
    - *Complete* all fields.
    - *Save the page.*
12. *Click* the **Assurances, Common and Program** tab.
    - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, McKinney-Vento Assurances, and Final Assurance Agreement.

    The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

    - (AR only) *Click* the check box on each applicable **Assurances** page.
    - *Save the page.*
      - Button text may say, "Legal Entity Agrees."

- (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Assurance Agreement** page. The date will auto-fill.

13. *Click* the **Submit** Tab.
14. *Run* the consistency check.
15. *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

16. (AR only) *Click* the **SUBMIT TO OPI** button to submit the application.

> **Note:** If district staff with the LEA data entry role are running the consistency check, the button text is "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

If your district's application is approved for funding, you may have to create an amendment to adjust the budget to the awarded amount. Click here for information on how to create an amendment to an approved application.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
  - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
  - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

MODIFYING APPLICATIONS/AMENDMENTS WHEN "RETURNED FOR CHANGES"

Note about Pop-up Blockers: It is critical that pop-up blockers be off to have the program operate properly. Use the following link for instructions on how to disable pop-up blockers.

http://www.hotcomm.com/FAQ/FAQ_popups.asp

OPI REVIEW PROCESS

Once a district submits an E-Grants application to the OPI, the application is reviewed for compliance. If the application does not meet the specific requirements for each program, the OPI will return the application electronically to the district. This gives the district the opportunity to modify the application for final approval by the OPI.

REJECTED APPLICATION/AMENDMENT INSTRUCTIONS

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
2. *Click* on the appropriate program from the **Menu List** (e.g. ESEA/NCLB Consolidated).
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button to select the application/amendment with a status of "Returned for Changes" on the **Application Select** page.
5. *Click* the **REVIEW SUMMARY** button on the **Application Select** page.
   - A table opens showing the application/sections that have been accepted or rejected by OPI staff.
6. *Click* the radio button next to the section that has a status of "returned" on the **Review Summary** page.
7. *Click* **REVIEW CHECKLIST** (opens in a new browser window).
   - The checklist displays OPI comments from the review of each program. The comments direct you to the sections of the application that need modifications.

   If the Review Checklist doesn't open in a new window, your browser's pop-up blocker may be preventing it from opening. Turn off your browser's pop-up blocker and try again.

- **Suggestion:** *Print* the "Review Checklist" for reference.
  - *Click* the "Printer-Friendly" hyperlink on the upper-right-hand section of the review checklist page.
  - Use your browser's print function to *print* the page.
  - *Click* the **CLOSE PRINTER FRIENDLY PAGE** button.

8. *Click* the "Close Browser" hyperlink (upper-right corner) to close the "Review Checklist" and return to the application.
   - Only the window with the checklist will close. The original browser window will still be open.
9. *Click* the **Page Lock Control** tab (opens **Page Review Status** page).
10. *Select* the "Expand All" check box to display all pages. Use the comments on the **Review Checklist** to determine which pages need to be changed.
    - *Click* the "Open Page for Editing" check box for all application pages needing modification if they show as "locked" in the "Page Status" column.
    - *Save the page!!!*

Note: If the application pages are "open for editing" on the **Page Review Status** page, but the pages display a "locked" message, go to the **Submit Page** and *click* the **UNLOCK APPLICATION** button.

11. *Click* the tab of the first page needing to be modified.
    - Use the drop-down list in the upper-right of the page to get to the appropriate program level, if needed.
12. Make changes to all appropriate application pages as required (with guidance from the comments on the **Review Checklist**).
    - *Save each page that is modified.*
13. *Click* the **Submit** tab.
    - *Run* the consistency check.
    - *Correct* any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

14. (AR only) *Click* **SUBMIT TO THE OPI** button to *submit* the application.

    Note: If district staff with the LEA data entry role are running the consistency check, the button text is "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be "Submitted to SEA."

CREATING AMENDMENTS TO APPROVED APPLICATIONS

When districts need to make modifications to a "Final Approved" application in E-Grants, an amendment must be created. Some common changes that require an amendment to an E-Grants application are:

- Budgeting carryover funds added to the district's budget;
- Transferring the allocation of funds between eligible programs;
- Re-budgeting object of expenditure or purpose category codes on the budget detail page of an approved application;
- Budgeting reallocated funds added to the district's budget; and
- Program objective or activity changes.

Important Information about Carryover: When a prior year final expenditure report for a carryover-eligible program has been approved, E-Grants automatically brings eligible unexpended funds forward to the districts' current year budget as carryover and generates an automatic e-mail to the district AR and persons who have been entered on the respective application's **Contact Information** page. This is the district's notice that there may be carryover funds to include in the current-year budget. If the prior year final expenditure report is approved *after* the creation of the current year application, an E-Grants amendment to the current year budget is necessary.

Note for Consolidated Applications (ESEA/NCLB and IDEA): All carryover funds stay with the prime applicant/administrative agent. The prime applicant/administrative agent is responsible for submitting amendments; member districts do not take any action.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* on the appropriate grant from the **Menu List**.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button of the most recently approved application or amendment.
5. *Click* the **CREATE AMENDMENT** button.
6. *Select* **Page Lock Control** (furthest right tab on the tab strip).
7. *Click the* "Expand All" check box.

8. *Click* the check box to the right of the page(s) needing modification.
   - "Open Page for Editing" unlocks the Web pages that need modification (i.e., Budget Detail, Program Detail, Private/Nonpublic Equitable Share, Targeting Step 4, etc.).
   - *Save the page.*
9. **ESEA/NCLB and IDEA only:** Use the drop-down menu titled "Application Sections" in the upper-right corner of the page to select the appropriate program for modification.
10. *Click* on the tab (page) to be modified (i.e., Budget Detail, Program Detail, Private/Nonpublic Equitable Share, etc.).
    - Make the necessary changes.
    - *Save the page!!*

Note to ESEA/NCLB and IDEA applicants: If the modification increases or decreases an allocation for a program, the district will need to *re-save* the Private/Nonpublic Equitable Share page under the selected program's Budget Pages tab.

11. *Return* to the **ESEA/NCLB Consolidated** level of the application from the drop-down list in the upper-right corner.
12. *Click* the **Amendment Description** tab.
    - If the page is locked, unlock it on the **Page Lock Control** page.
13. *Click* the check box of the application section(s) where the district made changes on the amendment.
    - Single programs such as Gifted and Talented, Migrant, and Carl Perkins do not have check boxes.
    - *Enter* a short description of all the changes in the text box.
    - *Save the page!!*
14. *Click* the **Submit** tab.
    - The **Submit** tab is on the consolidated level of the ESEA/NCLB and IDEA applications.
    - *Run* the consistency check.
    - *Correct* any errors that display.
      - If the consistency check identifies changes on pages that have not been unlocked, go to the **Page Lock Control** page and unlock them.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

15. (AR only) *Click* the **Submit to the OPI** button to *submit* the application.

> **Note:** If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the amendment has been submitted, the **Application Select** page status will be "Submitted to SEA."

ADDITIONAL INFORMATION

Funding/Allocations Tab (Page)

The carryover amount will be in the "Carryover" row under "Prior Year Funds."

REAP-flex (100% transferability) districts may transfer up to 100% of the carryover funds into receiving programs.

Districts with Schoolwide programs that transferred funds to the Schoolwide budget in the original application:

- *Go to* Title IA Basic, **Targeting Step 4** page and redistribute the allocation.
- *Click* each blue button on the **Targeting Step 4** page in the order in which they appear to accurately redistribute funds.
- *Return* to the **Funding/Allocations** page.
- *Enter* the amount to transfer into the schoolwide row.

Budget Detail Tab (Page)

The "Allocation Remaining" figure at the bottom of the **Budget Detail** page will display the carryover or reallocated funds to be budgeted for that program.

- *Distribute* funds under the appropriate object codes and purpose categories.
- Districts have the option to budget up to the "Maximum Indirect Cost" (Line E). If desired, *enter* the Indirect Cost amount in Line G.

PRINTING E-GRANTS APPLICATIONS

Because applications are very large files, print requests go into a queue during the day and process at night when the system is not in high demand. Consequently, applications are not available immediately upon request.

Day One

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
    - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* on the desired grant from the **Menu List** (opens the **Application Select** page).
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button next to the application to be printed.
5. *Click* the **PRINT ALL** button.
    - A "Print all request pending by (name) (date) (time)" message displays to the right of the **PRINT ALL** button.
    - An e-mail is automatically generated stating that the request for print has been received.
        - The application printout is not sent via e-mail.
    - The printable application will be available the next day in the E-Grants System.

Day Two

An automatic e-mail is generated when the application is ready for printing. To access the print-out follow these steps:

1. Follow Day One steps 1 - 4 to select the application.

2. *Click* the blue hyperlink under "Printed Applications:"
    - The requested application will display as a PDF document in a new browser window.
3. Use your browser's print function to *print* the application.

Note: Users must have Adobe 7.0 or higher to view the application. Districts can download the latest version of Adobe Reader. The following link is available on every OPI webpage. http://www.adobe.com/products/acrobat/readstep2.html

PRINTING THE GRANT AWARD NOTICE (GAN)

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* on the desired grant from the **Menu List**.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button next to the most recent application or amendment with a status of "Final Approved."
5. *Click* the blue "GAN" hyperlink to the right of the "Final Approved" status on the **Application Select** page.
6. Follow the 4-step instructions on the **Grant Notification Award** page to view the GAN as a pdf document.

The GAN documents include the following information for the Prime Applicant:

- Program Name
- Federal Award Number
- Statutory Authority for the Program
- Revenue and Expenditure Accounting Codes
- Project Number
- Terms and Conditions of Award
- Project Period
- Reporting Due Dates
- Award Amounts (original and amended amounts)
- Approval Dates
- OPI Contact Information

Note: Users must have Adobe 7.0 or higher to view the application. Districts can download the latest version of Adobe Reader. The following link is available on every OPI webpage. http://www.adobe.com/products/acrobat/readstep2.html

E-GRANTS PAYMENT SYSTEM

This section provides step-by-step instructions to help District Clerks/Business Managers complete and submit Cash Requests and a Final Expenditure Report (Fiscal Closeout) for applications in E-Grants.

CASH REQUESTS AND EXPENDITURE REPORTS

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Select* the appropriate grant from the **Menu List**.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button next to the most recent, final-approved application or amendment.
5. *Click* the **PAYMENTS** button (opens the **Payment Summary** page).
   - The **Payment Summary** page displays the most current Grant Allocation by program; completed (paid by the OPI) payments; and balance remaining.
   - To view a history of payments made by program, *click* on the blue hyperlink (dollar amount paid) under the **Completed Payments** row.
6. *Click* the **VIEW CASH REQUESTS/EXPENDITURE REPORTS** button.
7. *Select* the appropriate program from the drop-down list near the top of the page.
8. *Click* the **CREATE NEW REQUEST** or **CREATE EXPENSE REP** button.

   – OR –
9. *Click* the radio button next to the desired cash request or expenditure report and **OPEN REQUEST/OPEN EXPENSE REP** button.

CREATING A CASH REQUEST

Click here to skip to the “Creating an Expenditure Report” section.

1. *Select* the object code for which cash is being requested.
   - Object codes used must be the same codes budgeted on the budget detail page of the corresponding program application.

- *Click* on the blue “Description of Object Codes” hyperlink for a description of the codes.

2. *Enter* a brief description of the request.
    - A description for object code 600 – Supplies might be, "text books for reading program", or “educational materials for professional development training for math teachers."
3. *Enter* the amount of the request for the selected object code.
    - Use whole dollars only and omit decimal places.
4. *Click* the **CALCULATE TOTALS** button.
    - The Final Approved Budget by object code will display.
    - Requests can be up to 50% more than the amount budgeted for an object code.
        - A red “warning” will appear at top of page if object code requests exceed the 50% threshold.
        - Cash requests exceeding 50% over the budgeted object code amount require a budget amendment. Click here to go to the section on completing amendments.
5. *Click* the **CREATE ADDITIONAL ENTRIES** button if needed.
6. *Enter* an indirect cost amount, if applicable.
    - The district must have an approved and budgeted indirect cost rate to claim indirect costs.
    - Object codes 700-Property and Equipment and 900-Transfers cannot be included in indirect cost claims.
7. *Enter* the “End Period Expense (MM/DD/YYYY)” date.
    - For an advance, enter the last day of the following month.
        - Payments requested by the 25th of one month are made on the 10th of the following month.
        - To comply with federal cash management regulations, request only enough cash to cover costs through the date of the next month's payment.
8. To delete a cash request for an object code, *click* the “Delete Row” box to the right of the line and *click* the **SAVE PAGE** button.
        - It will be deleted when the page is saved.

9. Review the "Recap" section at the bottom of the page.
    - Grant Award (Allocation): Displays the current allocation.
    - Approved Budget: Displays the current approved budget, including any approved amendments to the budget.
    - Amount Paid to Date: Displays payments that have been made by the OPI.
    - Expenses to Date: Since only one cash request needs to be processed before the expenditure report is required to be submitted at the end of the grant period, this will normally display $0.
    - Balance Due LEA: NOT USED
    - Funds on Hand: NOT USED
10. *Click* the **SAVE PAGE** button. Correct any errors displayed and resave.
11. *Click* the **SUBMIT** button.
    - The **SUBMIT** button is only available to users with "submit" authority (i.e., Authorized Representative or LEA Business Manager).

CREATING AN EXPENDITURE REPORT

Users can create an expenditure report, open an existing expenditure report, or withdraw an existing expenditure report. The expenditure report can be created at any time after final approval of an application but submitted only once, which is at the end of the grant period to close out the project.

1. *Click* **CREATE EXPENSE REP** to open the **Periodic Expense Report** page.
    - The **Periodic Expense Report** displays the final approved budget by Object Code.
2. *Enter* the "Accumulated Expenditures to Date" amounts for each Object Code line. Enter whole dollars only.
    - Expenditures exceeding 50% over the budgeted object code amount require a budget amendment. Click here to go to the section on completing amendments.
    - Amendments are due no later than June 1st for projects that end June 30th, and September 1st for projects that end September 30th.
3. *Click* the **CALCULATE TOTALS** button to display the total of all lines and indirect cost recovery.
    - Expenditures (including indirect cost recoveries) should not exceed the total award amount.

- Indirect costs are not calculated on expenditures for Object Codes 700 Property and Equipment, or 900 Transfers.

4. *Select* the "Expenditure Period End Date" from the drop-down list.
   - There is only one date to select since only one expenditure report is required (to close out the project).
5. *Review* the "Recap" section at the bottom of the page.
   - Grant Award (Allocation): Displays the current allocation.
   - Approved Budget: Displays current approved budget, including any approved amendments to the budget.
   - Amount Paid to Date: Displays payments that have been made by the OPI.
   - Expenses to Date: Displays the total of expenditures reported on this report and any previous reports.
   - Balance Due LEA: Payments owed based on payments to date and reported expenditures, including this report.
   - Funds on Hand: Calculated cash on hand based on amounts paid to date and reported expenditures, including this report.
     - If this number is negative, the district will receive a payment for this amount.
     - If this number is positive, the district owes the OPI a refund for this amount.
6. *Check* the box for "Final Expenditure" at the bottom of the page.
   - *Save the page.*
7. *Click* the **SUBMIT TO THE OPI** button.
   - The **SUBMIT TO THE OPI** button is only available to users with "submit" authority (i.e., Authorized Representative or LEA Business Manager).

PAYMENT SYSTEM TIPS AND TRICKS

- Do not create a cash request and expenditure report at the same time. To request cash as a final payment:
  - Submit either a cash request first and wait for payment then submit the final expenditure report; or
  - Submit a final expenditure report with a balance due to the district. The OPI will pay on the final expenditure report.

- Create an expenditure report early in the project year (without submitting it to the OPI) to see a summary of the most recent approved program budget by object code. This can be very helpful when creating cash requests.
  - Do not check the "Final Expenditure" box until ready to submit to the OPI.

MODIFYING CASH REQUESTS/EXPENDITURE REPORTS WHEN "RETURNED FOR CHANGES"

OPI REVIEW PROCESS

Once a cash request or expenditure report has been submitted to the OPI, it is reviewed by an OPI program accountant. If a request is returned to the district for changes, an automatic e-mail is sent notifying the authorized representative that the request has been returned. (The district clerk will not receive the e-mail notification *unless his/her e-mail address is entered on the bottom of the* ***Contact Information*** *page* in the respective application.) To review the status of the review and comments by the OPI, take the following steps.

RETURNED CASH REQUEST/EXPENDITURE REPORT INSTRUCTIONS

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
   - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Select* the appropriate grant from the **Menu List**.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button next to the most recent, final-approved application or amendment.
5. *Click* the **PAYMENTS** button (opens the **Payment Summary** page).
6. *Click* the **VIEW CASH REQUESTS/EXPENDITURE REPORT** button.
7. *Select* the appropriate program in the drop-down list in near the top of the page.
8. *Click* the radio button next to the Cash Request or Expenditure Report that was returned for changes.
9. *Click* the **REVIEW SUMMARY** button.
10. *Click* radio button.
11. *Click* the **REVIEW CHECKLIST** button (opens in a new browser window).
    - The text in the comment box explains the needed modifications.

If the Review Checklist doesn't open in a new window, your browser's pop-up blocker may be preventing it from opening. Turn off your browser's pop-up blocker and try again.

- **Suggestion:** *Print* the "Review Checklist" for reference.
  - *Click* the "Printer-Friendly" hyperlink on the upper-right-hand section of the review checklist page.
  - Use your browser's print function to print the page.
  - Click **CLOSE PRINTER FRIENDLY PAGE** button.
- Click "Close Browser" hyperlink under the "Printer-Friendly" link to close the checklist.
  - Only the window with the checklist will close. The original browser window will still be open.

12. In the original browser window, *click* on the "Click to return to CashReqst/Expend Menu" hyperlink located on the upper-right-hand side of the cash request or expenditure report page.
13. *Click* the radio button next to the request/report that shows a status of "Returned for Changes."
14. *Click* on the **OPEN REQUEST** button.
    - Make the required adjustments.
    - *Save the page.*
15. *Click* the **SUBMIT** button to resubmit the request to the OPI for review.